**Sugar
Research and Development
Corporation**

Conflict Over Land Use
Urban Development or Canefarms?

Occasional Paper No 01/99

**Occasional
Paper
Series**

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1 Introduction to the Issues

Australian agriculture is under increasing pressure from urbanisation.

In the 1920's, only 40% of Australians lived in cities. Today, 85% of our population is urbanised.

As a result, few Australians now have links or even first hand experience of a farm. This is reflected in the Australian community's questioning of farming practices and its desire to protect "the environment".

The media and literature are increasingly portraying farmers negatively. Consumers don't believe farmers care for the environment. However, many of these same consumers are not willing to pay a premium for "organically" grown products.

At the same time, consumer lobby groups are becoming increasingly powerful and more sophisticated in the use of that power.

Proactive monitoring and managing of community perceptions has become important for all agricultural industries. For the Australian sugar industry, it has become critical.

While more than 400 hectares of rural land across Australia are lost to urban expansion each day, the trend is particularly strong along the coastal belt of Eastern Australia, where Australia's $2 billion a year sugar crop grows.

Coastal areas are in demand for residential development, tourism, recreational activities, and for the conservation of biodiversity, habitats and environmental quality.

Good agricultural land that has traditionally produced sugar is becoming threatened by urban expansion and the fragmentation of viable farming units.

Along with the physical loss of productive land, urbanisation has also brought residents who are not necessarily supportive of normal cane farming practices.

Negative perceptions and attitudes towards the sugar industry are a threat to the industry's long-term sustainability.

The sugar industry needs to become more active in positioning itself positively at the local community level.

1.1 Research Objectives

The Sugar Research and Development Corporation (SRDC) funds research and development projects aimed at improving industry competitiveness.

Urbanisation has been identified as a threat to the Australian sugar industry's long-term sustainability. SRDC commissioned Agri-focus Pty Ltd to research ways of resolving urban/rural conflict.

The researchers found that tackling negative perceptions about the sugar industry and positively positioning the industry at the **local level** can resolve damaging conflict.

This Occasional Paper outlines methods of achieving this.

1.2 Background

Supporters of protecting agricultural land argue that hobby farmers and increased residential development cause land use conflict and increase the price of land.

Higher land values result in higher rates and taxes. Prime agricultural land is a finite resource which needs to be protected to ensure agricultural viability and efficiency.

The arguments against protecting agricultural land from subdivision rest heavily with encouraging economic development and attracting wealth to a region.

Farmland preservation has attracted much attention in the United States. Measures used range from:

- right to farm ordinances;
- preferential assessment of farmland;
- agricultural zoning;
- direct acquisition of farmland;
- tax relief for agricultural uses of land; and
- purchase of development rights.

Apart from increasing land values when urban development occurs close to farmland, there generally comes human conflict.

US studies conclude that from the farmer's perspective, conflict can arise because there may be:

- a loss of crop land along boundaries;
- complaints regarding chemical or manure application;
- damage to crops and property from trespassing, theft, and vandalism;
- competition for ground water;
- fires;
- septic waste contamination;
- urban runoff onto farmland;

- illegal rubbish dumping; and
- loss of farm support businesses.

For residents, complaints about agricultural practices range from:

- spray drift;
- noise;
- dust;
- smoke and ash;
- animal and spray odours;
- machinery noise;
- animal waste disposal;
- farm machinery on roads;
- scare or hail cannons; and
- 24 hour operations.

The US research has concluded that the only way to avoid these conflicts is to change the way land is developed - various land uses should be insulated from each other.

In Australia, there have been a range of responses to the loss of agricultural land, from doing nothing to full planning controls.

At the state level, there are strategy papers offering policy guidance and planning policy. At a regional level, there are regional strategic plans and at the local government level, local planning schemes. Sometimes, market forces are simply allowed to determine the best allocation of land.

Other options include:

- rate rebates on rural land retained for farming;
- consolidation of titles through some formula;
- greater flexibility in rural planning controls;
- betterment levy; and
- user-pays for provision for existing rural residential areas to reduce future demands for conversion of farmland to rural residential use.

Researchers argue the solution is a matter of strategic planning, zoning land for particular uses and enforcing zoning regulations. However, the issue is complicated by the layers of government involved, the cost of implementing land preservation schemes and the need to recognise agriculture as a legitimate activity.

Existing conflict is best managed through negotiation on a one-on-one basis to determine what are acceptable practices.

Land planners highlight the importance of education campaigns to inform non-agricultural residents of the benefits of the particular industry. Many disputes arise because of a lack of information and understanding about why certain practices are carried out or their effects on nearby residents.

The Queensland Government's policy is that good quality agricultural land is a finite national and state resource that must be conserved and managed for the longer term.

The policy states that good agricultural land can be developed where there is demonstrated an overriding need for the development in terms of public benefit and no other site is suitable for the particular purpose.

1.3   Research Methodology

Agri-Focus Pty Ltd developed a model to analyse urbanisation issues.

This model:

1.   identifies issues of concern about the sugar industry at the local level;
2.   provides a decision making process about tackling the issues of concern; and
3.   provides strategies to positively position the industry locally.

The model is essentially a method of issue identification and decision making.

Much of the research focused on people's perceptions because people's behaviour is based on their perception of what reality is, not reality itself.

The model uses a residents' telephone survey to identify local community attitudes and perceptions about the sugar industry.

A residents' survey is necessary because it:

• quantifies and verifies the local industry's beliefs about community perceptions;
• enables the development of proactive steps to manage potential conflict areas;
• gathers evidence of community support for the industry, which can be used, for example, when lobbying government; and
• enables the development of a positioning campaign that is based on the issues concerning the community.

The model also uses a cane grower questionnaire to determine long-term land use strategies.

The grower survey determines:

• whether growers are concerned about the permanence of the industry in the region;
• what growers believe the local community's concerns about the industry are; and therefore:
• grower awareness of local community feeling; and
• grower belief about the top national and local issues facing the industry.

The model also draws on experts in the region and includes an analysis of the local political environment.

The model was tested and refined by Agri-Focus Pty Ltd using the Maryborough sugar region as a pilot study.

2. Some Answers - The Issue Identification and Decision-Making Model

2.1 Introduction

The Issue identification and Decision-Making Model maps out a process that requires considerable input and consultation with key industry stakeholders.

Key industry stakeholders are local representatives from organisations such as:

- CANEGROWERS;
- Australian Cane Farmers' Association;
- local sugar mill/s,
- Bureau of Sugar Experiment Stations; and
- Cane Protection and Productivity Boards.

The model is illustrated by the following diagram.
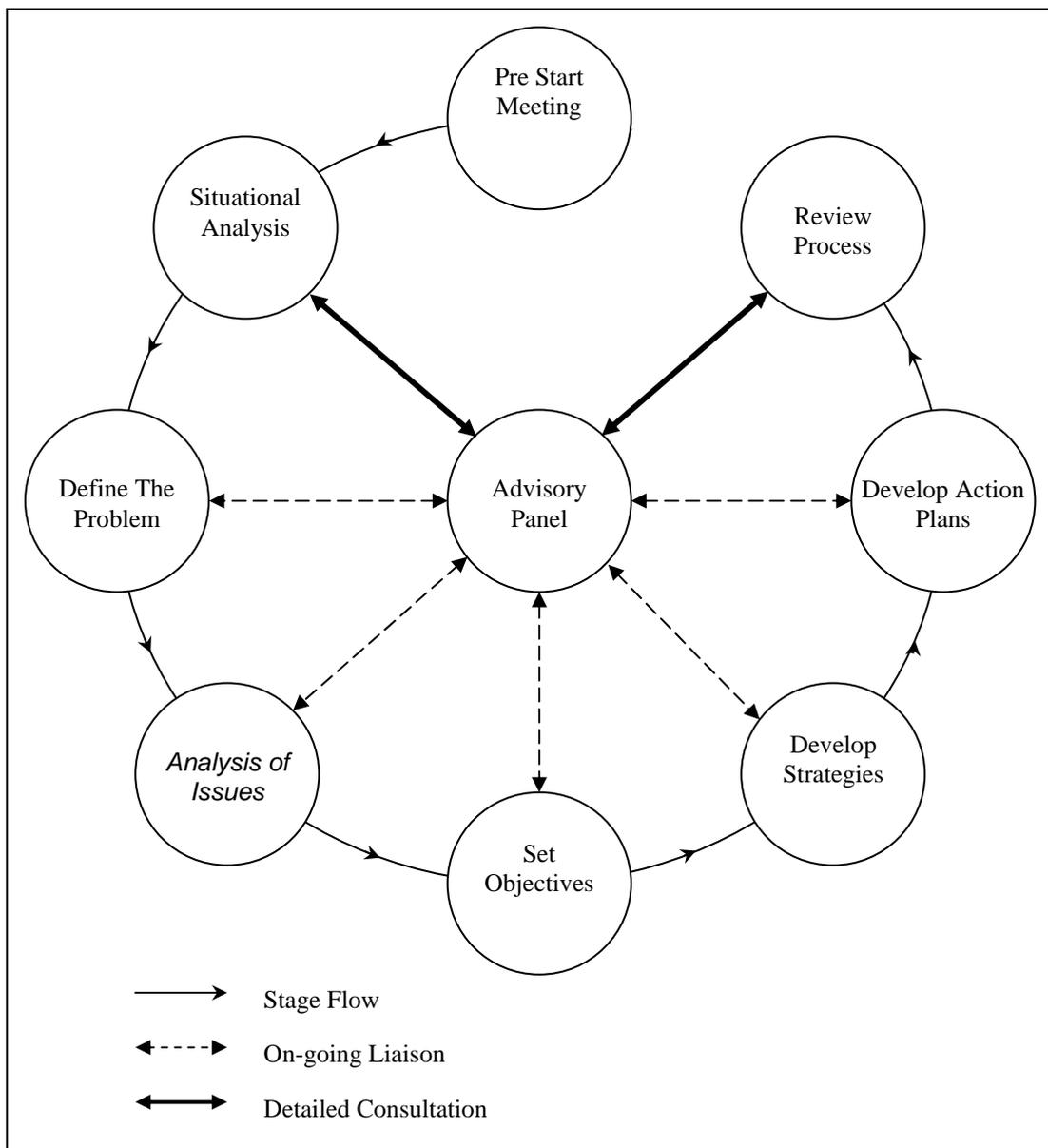
2.2   How Does It Work?

Following is a description of each phase of the Issue Identification and Decision-Making Model.

STEP 1   Hold a Prestart Meeting

To gauge the level of interest in urbanisation issues in a particular region, key local stakeholders need to be consulted. Holding a meeting of key stakeholders can be an effective way of assessing the level of interest and support.

Important questions to ask stakeholders include:

- How aware are key stakeholders of existing or potential land use conflicts?

- Do local stakeholders want to know about intangibles such as resident perceptions?

- Will key stakeholders support a "project" which identifies and tackles land use conflicts in the region?

If key local stakeholders are supportive, the following steps could be taken to identify the issues and tackle problem areas.

STEP 2   Analyse the Situation

a.   Conduct Background Scoping

Obtain from SRDC a copy of the full project report "*Conflict Over Land Use - Urban Development or Canefarms?*" for background information.

b.   Conduct Regional Scoping

i.   Consult regional industry stakeholders to:

- determine regional views on urbanisation;
- identify the current and past activities of stakeholders in dealing with residents' concerns, complaints about the sugar industry, and local promotion of the industry;
- determine how successful these actions have been and why;
- determine how industry stakeholders would like the industry to be seen by the local community and how they believe the industry should be positioned;
- determine relevant unique regional characteristics which may influence future survey work;
- ensure continuing support for the project; and

- determine who would comprise an advisory panel;

ii.   Consult key local residents including:

- representatives of local community groups with concerns about or interest in the sugar industry
- town planners
- shire councillors

In discussions with this group aim to:

- obtain background on their main concerns about the sugar industry;
- find out from their perspective, what is being/has been done to tackle conflict areas;
- determine their understanding of the importance of the sugar industry to the region; and
- determine Council and town planner attitudes towards State Government guidelines for protecting agricultural land and to recommendations regarding buffer zone development.

These discussions can be held either by forming focus groups or by consulting each person, on a one-on-one basis.

c.   Form an Advisory Panel

To develop and action strategies, form an Advisory Panel. The Advisory Panel needs be kept well briefed of all activity and its continued support of the project is critical to its success.

Make sure the Advisory Panel is made up of industry stakeholders who have authority and credibility to achieve results.

At this point, it is important to identify what funding and human resources are available for the project.

It is also necessary to work out the strategy implementation structure. Which organisation will carry out the strategies and actions as identified by the project? Will it be the Cane Protection and Productivity Board, the Mill, the Bureau of Sugar Experiment Stations (BSES) or perhaps through a separate structure yet to be established?

Forming an Advisory Panel, ensuring adequate resources are available and determining who will be responsible for implementation are steps crucial to the success of the project.

While **Step 1** may have indicated support for an urbanisation project, **Step 2b** may show that support is not strong enough for a project to proceed at this point in time.

d.   Modify Surveys

Modify the Growers' and Residents' surveys (*refer to the project report*), based on the discussions held with regional industry stakeholders and key local residents.

The qualitative information gathered from these discussions should augment the quantitative results from the survey work.

STEP 3   Define the Problem

Conduct the Residents' Survey to determine attitudes and areas of local community concern about the sugar industry.

Conduct the Growers' Survey to determine the longer-term land use strategies and to gain an understanding of grower perception about the sugar industry's relationship with the local community.

These two surveys form the basis of the problem identification phase of the methodology. The difference between what the industry would like the situation to be and the actual situation defines the problem.

Ranking the issues of concern identified in the surveys will assist the advisory panel in prioritising areas of activity.

Step 4   Analyse the Issues

The project has now identified a range of **existing** issues of concern. In this step, each issue is analysed, so decisions can be made about how the concerns will be tackled.

In making decisions, the objective must be:

"to assist the sugar industry's long-term sustainability in the region by maintaining or improving the positioning of the industry in the minds of local residents. If residents have negative perceptions about an issue, there must be a communication component in the strategy to tackle the concerns (refer to Step 6)."

The Advisory Panel needs to analyse each issue of concern by answering:

A.   What is currently being done to tackle the issue?
B.   What type of strategy is appropriate for the issue?

Each issue of concern will probably fall into one of these categories:

1. The issue is currently being addressed;
2. The issue has been addressed;
3. The issue needs to be addressed by the local sugar industry;
4. The issue needs further research in order for it to be solved; or
5. It is unlikely a solution will be found to the issue.

What to Do:

1. Where the issue **is** currently being addressed -

Decide the strategy for:
- communicating what the industry is doing to tackle the issue; and
- maintaining and building on current activities, if positive attitudes already exist.

2. Where the issue **has** been addressed -

Evaluate the solution and decide:
- if it is what residents want;
- if there is a need for communication; and
- the extent to which the solution addresses the issue.

3. If the issue **needs to be** addressed by the local sugar industry -

Decide if it is:

- a production issue, where canegrower activities can be changed to address the issue;
- an issue that needs changes to government regulations and therefore lobbying by industry at the local, state and/or national level;
- an issue the mill needs to address.

4. Where **further research** is required -

Decide if the industry will:

- lobby SRDC, BSES, State Government Departments, Cooperative Research Centres to fund research into this area

5. Where it is **unlikely a solution will be found** -

Decide if there is a need to:

- develop strategies to minimise the negative impacts of the issue, including a crisis management strategy.

Other considerations when selecting the appropriate action include:

- likely returns from implementation;
- timeframe (is a short or long term strategy required);
- labour component and who would contribute this;
- can the issues be defined as a "mill or transport related problem" or as a "production or grower related problem"
- national, state or regional level intervention required;
- likely funds required to tackle the issues; and
- ability to change or control the issue.

Step 5   Set Objectives for Positioning Process

This step is about preventing **future** land use conflict through positive positioning of the sugar industry in the general community because resident perceptions about the industry, at the local level, are critical to its long-term sustainability.

What to Do:

1.   Develop a Vision of how the sugar industry wants to be positioned in the region.

2.   Decide what messages the industry wants to convey to the local community.

3.   Determine how this Vision fits with the industry's overall positioning.

Step 6   Develop Strategies

a.   Positioning Campaign - Shifting the Goal Posts

To ensure continued support of the local community, a regional positioning campaign may be necessary. Some positioning campaign strategies that could be considered include:

- Identifying regional stakeholders important to the sugar industry eg. conservation groups, local government representatives, land care and catchment coordinating groups, resident action groups, new residents.

- Developing clear regional positioning statements targeting each stakeholder group.

- Developing strategic relationships with key regional stakeholders.

- Ensuring communication channels are open and frequently used for positioning.

- Ensuring key regional stakeholders know the importance of the local sugar industry.

- Ensuring key regional stakeholders know what the local industry is doing to tackle potential conflict areas.

- Devising a system of perception monitoring, to ensure positioning campaign is working.

b.   Tackling the Current Issues - Coordinating Communication

While the issues identified in Step 4 require individual communication and public relations action, there is also a need for an overall, coordinated communication at the local level.

Possible elements of a local communications strategy are:

i.   Issues Management Plan

What to Do:

- Identify potential problem areas.
- Develop a policy response for each before they appear in the public arena.
- Nominate industry spokespeople.
- Distribute the policy response to relevant industry representatives.
- Develop an Action Plan to 'manage' the issue in the media.

Following is an example of a policy response.

Issue	Belief	Facts	Response
Pollution from smoke	The Sugar Industry has little or no interest in the impact of pollution on residents	The Sugar Industry is concerned about the impact of pollution from smoke and is actively working to minimise the impact	The Sugar Industry is encouraging the uptake of green cane harvesting practices and is developing an environmental Code of Practice

ii.   Crisis Communication Plan

A Crisis Communication Plan involves the development of a policy and a procedure for industry stakeholders and staff to follow in the event of a crisis.

Issues management, as described above, minimises the chance of a crisis occurring. However, it is not possible to anticipate every emerging issue and therefore a crisis can develop quickly and dangerously with little warning.

An effective Crisis Communication Plan can mean the difference between short-term, low-level negative publicity and long lasting ill-will among stakeholders.

What to do:

- Develop a policy and procedure document.
- Nominate a Crisis Communications Team and assign responsibilities.
- Distribute to all relevant industry representatives.
- Conduct a briefing to ensure all representatives understand procedures.

iii.   Reporting Structure

In creating a worthwhile and ongoing relationship with the media, local government, conservationists, residents and all key stakeholders, it is imperative that messages coming from the industry are uniform and consistent.

It is especially important to have clearly defined boundaries for communication because industry representatives, staff and/or consultants will change over time. A reporting structure will allow effective communication to continue even when the personalities change.

What to do:

Following consultation with industry stakeholders, establish a Communications Reporting Structure.

It should ensure that:

- All communication must be conducted through a nominated central point.
- Only nominated spokespeople can make comments to the media.
- All requests for media interviews/information must be cleared by nominated authorities.

A suggested Communications Reporting Structure:

Sugar Industry Communications Committee		
Communications Consultant/Coordinator		
Local Government	Media Organisations	Environmental Groups

The Communications Consultant/Coordinator is the conduit for all information and is the key to positive, effective and consistent communication.

This position could either be newly created or assigned to an industry staff member who already has communication responsibilities. That staff member would need to be non-aligned politically with any particular section of the industry.

An industry based coordinator would offer better access to information and management, better knowledge of the industry and could be cost effective.

A non-industry based coordinator would offer specialist advice on a range of issues, no political alignment, an outsider's perspective and could also be cost effective.

iv.   Other Strategies

As lobbying by various interest groups has become more sophisticated, it is vital to constantly update methods of communication.

While a newsletter continues to be an important tool in reaching some stakeholders, other tools including e-mail and websites on the Internet could also be used.

An increasing number of journalists have access to the Internet and their own e-mail addresses. This can be a valuable and inexpensive form of communication direct to the stakeholder.

A Home Page, based on industry "news", which is well designed and promoted can be updated continuously, providing a flow of timely information to the media. At the same time, residents and industry can also use this source of information, since many now have home computers and Internet access.

Step 7   Develop Action Plans

What to Do:

a.   Identify Alternatives

For each strategy, list the viable alternatives that could be used to resolve the problem. Also list the alternative actions, which may not solve the problem, but which may be acceptable to the Advisory Panel and which will alleviate the problem (particularly in situations where a solution is unlikely).

b.   Decide on the alternatives to be implemented

c.   Implement the Decisions

This is achieved by assigning responsibilities for actions, deciding on a timeframe, informing all relevant stakeholders and providing a breakdown of costs to carry out the plan for the first year (or particular period).

Step 8   Review Effectiveness of Decision

This is an important step in the process.

It involves building into the implementation process a monitoring and feedback component.

3.   The Maryborough Pilot Study

To test the Issue Identification and Decision-Making Model, the Maryborough cane growing region was used because there is significant population growth occurring.

3.1   Background

There is one sugar mill in the region which has the capacity to crush 750,000 tonnes of cane per year. However, on average since 1980 the mill has only crushed 470,000 tonnes because of poor seasons and loss of land planted to cane.

Between 1980 and 1995, 7.2% of land suitable for cane growing was lost to urban development. On top of this, 47% of the land within a 40 kilometer radius of the mill is held by the Crown.

Between 1996 and 2011, the region's population is expected to grow by 2.36% per year, with about one third expected to become rural residential dwellers.

More than 25% of assigned cane land is located in the Hervey Bay City region, one of the fastest growing areas of Queensland.

The industry directly employs 1000 workers and contributes $65 million per year to the local economy.

To counter declining production levels and rising costs, local stakeholders developed an industry plan. The plan aims to produce 750,000 tonnes of cane by 2000, through enhanced productivity and an agreement to swap forestry land for cane land.

3.2   Community Relationships

The industry has a positive relationship with key **local authorities** (Maryborough City, Hervey Bay City, and Tiaro Shire). Councils regard the sugar industry as an important staple in the local economy, underpinning tourism, housing and construction.

The **Department of Environment** receives 2-3 complaints about the sugar industry each year. These are generally made when land is cleared for cane production, creating dust and smoke.

The **Wide Bay Conservation Council** is the umbrella organisation representing 13 conservation groups in the Wide Bay and Burnett catchments. It has had very little contact with the sugar industry.

In general, the Maryborough industry is perceived by the community groups as being fairly active in promoting itself, but at the same time as being very insular. During the past three years, there has been a slight increase in the degree of conflict between the sugar industry and local residents.

3.3 How Complaints are Handled

When a complaint is made, CANEGROWERS or the BSES are the first point of contact. When the issue is production related, the CANEGROWERS representative handles it. It is usually handled on a one-on-one basis, keeping discussions as low key as possible. When the issue is mill or transport related, the mill tackles it. The mill has a complaint register and tries to act on complaints immediately.

Where an issue is seen to be an industry problem, the stakeholders work together to resolve the conflict.

3.4 What Maryborough Residents Think About the Sugar Industry

Two hundred people in the Maryborough region were surveyed, using the residents questionnaire referred to in Section 1.3.

In general, residents appeared to have a favourable perception of the Maryborough sugar industry, with over half indicating they had either a good or an excellent opinion of the industry. 40% said they had a neutral opinion, while 1% had a bad impression of the local industry.

Three in four residents surveyed thought the sugar industry was either extremely important or very important to the local economy, because it created employment and bought money into the region.

87% agreed the sugar industry had positively influenced quality of life in the region of Maryborough.

The relationship between industry and the community was perceived to be favourable, with almost half stating that relations were either excellent or very good.

When respondents were asked if they had concerns with the local sugar industry, over two thirds did not.

Of the less then one third that did, the concerns were:

- pollution from smoke due to burning off and its overall impact on the environment;
- problems relating to water and rainfall;
- traffic problems from the trucks;
- chemical pollution - chemicals drifting into residential areas;
- rubbish from cane transporters - dust and flowers cause hayfever and other allergies; and
- too many tourists and visitors to the area.

3.5   Maryborough Cane Grower Perceptions about Residents Concerns

Forty cane growers in the Maryborough region were surveyed, using the grower questionnaire referred to in Section 1.3.

28% of growers did not think there were any major problems within the local sugar industry. There was no mention of the loss of cane land or increased pressures from other local residents as being problems.

70% of growers were not aware of any resident concern about the local sugar industry.

Of growers who were aware of resident concerns, they thought the issues were:

- smoke pollution from burning off
- traffic problems from the trucks carrying cane
- canegrub, toads and vandalism
- water/drought
- chemicals drift into residential areas

58% of growers said they intended to continue growing cane. Of those who did intend to make changes, future plans included:

- sub-divide and sell all their land;
- children would take over;
- sub-divide and sell some land;
- use land for other products;
- sell land to other cane growers;
- sell land for other agricultural uses; and
- lease land to other cane growers.

The main reason for change was that respondents planned to retire and sell their land.

81% of growers thought the sugar industry's relationship with the local community was either very good or quite good, mainly because of the industry's efforts to keep in touch with the community through the media.

3.6 'SWOT' Analysis (Strengths, Weaknesses, Opportunities and Threats)

Strengths of Maryborough's Sugar Industry:

1. The industry long term economic contribution to the Maryborough region has resulted in its positive positioning in the minds of local residents.
2. Sugar has a heritage association with the region.
3. The sugar industry is accepted as important to the local economy.
4. It is deemed important in influencing local quality of life.

Weaknesses of Maryborough's Sugar Industry

1. Poor proactive communication channels between the local sugar industry, environmental groups and local media.
2. Failure to communicate in a consistent manner with stakeholders.
3. Lack of a recognised spokesperson for the industry.
4. Poor communication of industry messages.
5. Lack of positioning.
6. Fragmented nature of industry.
7. Lack of conflict resolution/negotiation training of officers handling complaints.
8. High turnover of local media representatives.
9. Maryborough and Hervey Bay editions of the local newspaper cover sugar industry issues differently.

Opportunities for Maryborough's Sugar Industry

1. Build on positive image.
2. Develop closer ties with the community and stakeholders
3. Train personnel to liaise with industry groups and media.
4. Educate the community about local industry issues.

Threats to Maryborough's Sugar Industry

1. Increasing lobbying sophistication of individuals and groups.
2. Growing awareness of environmental issues by the general public.
3. Increasing urbanisation in coastal areas.
4. Demand for rural residential land causing sub-division of single lots, reducing the availability of good quality agricultural land, and increasing the incidence of conflict.
5. Increasing conflict between farmers and residents
6. Increasing remoteness of rural industry from most Australians
7. Almost half the local residents have a neutral opinion of the industry.
8. Location of mill close to CBD.
9. The hostile element of the population, generally unemployed and living in rural residential areas.

3.7 What Did Key Stakeholders Believe?

Discussions held with the key stakeholders, identified there was:

- a lack of user-friendly information and proactive community education about the sugar industry;
- a relatively high proportion of small allotments;
- limited land for industry expansion;
- growing astuteness of conservation groups;
- a perception by others that the industry is undergoing an aggressive expansion program;
- a perception that the industry is fragmented, yet informal communication networks appear to work well;
- very high population growth in some areas.

4. Conclusion

There are major challenges facing the Australian Sugar Industry.

a.   Increasing urbanisation and expansion by the sugar industry into traditionally non-sugar industry areas are causing conflict over rural/urban land use.

b.   The trend towards urbanisation in Australia, generally, is causing rural industry to become increasingly remote from most Australians.

c.   Increasing public awareness of environmentalism combined with an increasingly sophisticated approach to lobbying are making people with environmental concerns more powerful.

In such a rapidly changing environment, no industry or company can be assured of maintaining continued support of the local community - regardless of how strong its history and heritage might be.

The only choice for the sugar industry is to adapt and fit into the new environment. Marketing, positioning, public relations and communications programs have become the means by which all companies and industries fit themselves into a new environment, assure stakeholders of their relevance and thereby advance their case for continued support.

Given the structure of the sugar industry, positioning needs to occur at three levels: national, state and regional.

The sugar industry lobbies very strongly at the national and state level. However, clear positioning statements need to be made about what the industry stands for and how it contributes to Australia's economy.

While effective communication resources already exist within industry bodies, this research has revealed that the media and local government is confused about where to access timely and user friendly sugar industry information.

A communications Strategy based on the premise that *"positive resident perceptions regarding the local sugar industry are critical to long term sustainability"* could give the industry a powerful and united platform for future marketing.

While individual organisations within industry will correctly continue to pursue their own agendas, the imperative to dispense with a fragmented and sometimes inconsistent approach could be achieved under the umbrella of such a strategy.

Such communication campaigns could underpin regional positioning campaigns.

The Issue Identification and Decision-Making Model described in Section 2 of this Paper could be used to identify key issues of concern and assist in developing strategies to tackle them.

This would be part of a broader regional campaign, which would need to:

- develop strategic relationships with other stakeholders;
- ensure communications channels are open and frequently used;
- ensure regional players know the importance of the sugar industry; and
- ensure regional players know what is being done to tackle potential conflict areas.

The sugar industry as a whole is not under threat from urbanisation, however, some regions of the industry most certainly are. Positive community perceptions in those regions is critical to the sugar industry's long-term sustainability.

Urbanisation is a major trend of the twentieth century. Increased urbanisation brings increased rural-urban conflict. The conclusion from this research is that education and communication at all levels is the key to resolving conflict over land use.